R E P O R T R E S U M E S

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ESSENTIALS OF MERCHANDISING, A SUGGESTED ADULT DISTRIBUTIVE EDUCATION COURSE OUTLINE.

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THIS OUTLINE FOR A COURSE IN THE ESSENTIALS OF MERCHANDISING IS DESIGNED FOR THE INEXPERIENCED RETAIL EMPLOYEE. THE COURSE IS PLANNED FOR SIX 2-HOUR SESSIONS ON (1) FUNDAMENTALS OF MERCHANDISING, (2) TERMINOLOGY AND MATHEMATICS OF MERCHANDISING, (3) BUYING POLICIES AND PRACTICES, (4) MARKET REPRESENTATIVES, (5) TERMS OF PURCHASE, INCLUDING DISCOUNTS, DATING, AND SHIPPING TERMS, AND (6) MERCHANDISING PERSONNEL, INCLUDING QUALIFICATIONS AND DUTIES. THE OUTLINE OF EACH SESSION PERHAPS CONTAINS MORE THAN CAN BE COVERED IN A SESSION, WHICH ALLOWS THE TEACHER TO SELECT, ADAPT, AND MODIFY THE CONTENT TO FIT THE LOCAL PICTURE. THE NATURE OF THE TOPICS PRESENTED PERMITS THE TEACHING OF CERTAIN SESSIONS EACH BY A DIFFERENT TEACHER, BUT ONE PERSON SHOULD SERVE AS COORDINATOR. GROUP PARTICIPATION AND DISCUSSION SHOULD BE USED. THE COURSE MAY BE TAUGHT BY A MERCHANDISE MANAGER, A DEPARTMENT HEAD OR BUYER, OR A DISTRIBUTIVE EDUCATION TEACHER. A BIBLIOGRAPHY, TIPS TO TEACHERS, AND POINTERS FOR DISCUSSION LEADERS ARE APPENDED. (SM)

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essentials of merchandising

a suggested adult distributive education course outline

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ESSENTIALS OF MERCHANDISING

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A Suggested Adult Distributive Education
Course Outline

1966

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FOREWORD

Emphasis on training for various types of distributive occupations is to be expected in a distribution-centered economy. Furthermore, the ability of a distributive establishment to make a profit depends mainly on its success in merchandising goods and services in a competitive market.

This adult course outline, Essentials of Merchandising, was developed originally by the staff of the Bureau of Business and Distributive Education from materials used in the adult distributive education programs in Connecticut and several other of the northeastern states. The present version was prepared by Stanley Markman, distributive education teacher-coordinator at White Plains High School, White Plains, New York, under the direction of E. John Gradoni and Hunting Sherrill of the bureau mentioned above.

It has been said that merchandising is the most important function in any distributive establishment. A firm which cannot master the arts of buying and selling is not likely to stay in business very long. On the other hand, the firm whose employees understand the importance of the merchandising function has a promising future. These employees are great assets to a retail organization and are eagerly sought after.

The Bureau of Continuing Education Curriculum Development revised and edited the manuscript for this bulletin and prepared it for printing.

It is hoped that this course outline will be helpful to directors of adult education programs and to teachers in such programs. As they gain experience with this outline they may wish to submit suggestions for improvement. Such suggestions will be welcomed by the Bureau of Continuing Education Curriculum Development.

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INTRODUCTION

The term merchandising has been used to cover a great variety of activities ranging from stock control procedures instituted by wholesalers and retailers to promotion by manufacturers aimed at resellers. From an operational standpoint, merchandising refers to all the buying and selling activities of marketers. Definitions differ, but it is generally agreed that merchandising is a large and complicated subject.

This suggested outline for a course in Essentials of Merchandising is designed for the inexperienced retail employee. It includes only a brief consideration of such factors as basic merchandising principles, terminology, budgeting and merchandising mathematics, terms of sale, organization, and staffing. The outline of each session perhaps contains more than can be covered in a session; this allows the teacher to select, adapt, and modify the content to fit the local situation.

This course is planned for a minimum of six 2-hour sessions. Likely teachers include a merchandise manager, a department head or buyer, and a distributive education teacher. The nature of the topics presented permits the teaching of certain sessions each by a different teacher. If more than one teacher is used, one person should serve as coordinator to assure continuity. Whenever possible, group participation and discussion rather than the lecture approach should be used.

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CONTENTS

		Page
Foreword		iii
Introduction		iv
Session		
I	Fundamentals of Merchandising	1
II	Terminology and Mathematics of Merchandising	3
III	Buying Policies and Practices	5
IV	Market Representatives	6
V	Terms of Purchase: Discounts, Dating, and Shipping Terms	8
VI	Merchandising Personnel: Qualifications and Duties	10
Bibliography		12
APPENDIX		15
	Tips for Instructors	15
	Pointers for Discussion Leaders	18

Session I

Fundamentals of Merchandising

A. Definition

1. Merchandising is the process of providing customers with what they want, when they want it, at the prices they are willing to pay, and at prices which allow a profit to the store.
2. Merchandising refers to all the mechanics of buying merchandise and selling it to the customer. Merchandising is often considered the primary function of retailing.
3. The merchandise division is that part of a store's organization responsible for selecting merchandise to meet customer needs.

B. Sources of information on customer wants

1. Requests by customers
2. Analysis of past sales
3. Want slips
4. Customer surveys
5. Market and trade reports

C. Sales analysis

1. Steps in analysis

a. Daily analysis and permanent recording of sales

(1) Stubs of price tickets
(2) Duplicate sales checks
(3) Control cards in boxed stock
(4) Tally sheets of salespeople

b. Analysis by color or size where pertinent

c. Periodic inventory of staple merchandise

d. Movement of inventory from reserve to forward stock

2. Information provided by sales analysis

a. Daily movement of individual items
b. Movement of individual vendor's goods
c. Movement by price lines
d. Movement by color or size
e. Ratio of sales to stock on hand

3. Uses of sales analysis by buyers

a. Identify best sellers

b. Indicate high-turnover classifications
c. Locate preferred resources
d. Determine price lines to emphasize
e. Find color and size preferences
f. Suggest markdown items

D. Ways of finding out market offerings

1. Comparison shopping
2. Traveling salesmen
3. Market representatives
4. The wholesale market
5. Television and motion pictures
6. Trade papers
7. Consumer publications

E. Store policies which affect merchandising

1. Kinds of merchandise carried
2. Alterations on garments
3. Delivery
4. Price range
5. Cash and credit policy
6. Returns

Session II

Terminology and Mathematics of Merchandising

A. The language of merchandising

1. Types of goods

a. Staple goods
b. Fashion goods
c. Convenience goods
d. Shopping goods
e. Impulse goods
f. Durable goods
g. Nondurable goods

2. The language of fashion

a. Fashion
b. Fashion cycle
c. High fashion
d. Style
e. Vogue
f. Fad
g. Period (as applied to furniture)
h. Loss leader

B. The merchandise plan or budget

1. Purposes

a. To encourage buyers to consider in advance the purchases they make
b. To decide on other activities needed for success in the business period of these purchases

2. How the merchandise plan operates

a. Merchandise plans are usually 6-month seasonal plans.
b. Sales are planned for a season and then broken down into monthly sales.
c. Markdowns are planned similarly for a season and by month.
d. Stocks are planned for each month and for the end of the season.
e. Other <u>seasonal</u> goals are planned, based on <u>yearly</u> goals for initial markup, inventory turnover, stock shortage, maintained markup, discounts earned, and profit.

C. Merchandising mathematics

1. The markup equations:

   a. Cost + Markup = Retail price
   b. Cost = Retail price - Markup
   c. Markup = Retail price - Cost

2. The percent of markup:

$$\text{Markup \%} = \frac{\text{Markup amount}}{\text{Retail price}}$$

3. The cost price:

Cost = Retail price X (100% - Markup %)

4. The retail price:

$$\text{Retail price} = \frac{\text{Cost}}{100\% - \text{Markup \%}}$$

5. The markdown:

Markdown = Original selling price - Sales price

6. The stock turnover:

   a. Retail basis:

$$\text{Stock turnover} = \frac{\text{Net sales in dollars}}{\text{Retail value of average inventory}}$$

   b. Cost basis:

$$\text{Stock turnover} = \frac{\text{Cost of merchandise sold}}{\text{Cost of average inventory}}$$

   c. Unit basis:

$$\text{Stock turnover} = \frac{\text{Number of units sold}}{\text{Average number of units in inventory}}$$

Session III

Buying Policies and Practices

A. Considerations in buying a new item

1. Does it have appeal to a specific customer group?
2. Is it suitable for my store?
3. Will it duplicate goods in my present stock?
4. Will it give good service for a reasonable length of time?
5. Is it a good value at the price?
6. Will my customers be willing and able to buy it at the price?
7. Does it provide a satisfactory profit?
8. Is it properly packaged?
9. Is it worthy of special promotion? Have I a promotion plan for it backed by the manufacturer?

B. Factors in deciding where to buy

1. Suitability of supplier's delivery to customer demand
2. Speed and dependability of delivery
3. Quantity the vendor can ship
4. Favorability of prices
5. Vendor's policies on pricing and brands
6. Suitability of credit arrangements
7. Newness of vendor's line
8. Completeness of his line
9. Availability of dealer aids
10. Vendor's fairness in dealing with complaints

C. Steps in buying

1. Plan what to buy.
2. Decide where to buy.
3. Select styles, colors, fashions, quantity, and prices.
4. Follow rules for buying.

D. Ethics in buying

1. Don't ask for unreasonable concessions.
2. Don't cancel orders unfairly.
3. Don't claim imagined shortages or damages.
4. Don't pass "poor buy" losses back to the vendor.
5. Don't bluff to cover up what you don't know.
6. Don't accept personal favors from sellers.
7. Don't return merchandise unless:

    a. The goods fail to meet specifications or are not as described.
    b. The terms of sale on the invoice differ from those agreed upon.
    c. Quantities, colors, or styles are not as ordered.
    d. The goods arrive after, or far in advance of the date promised.

Session IV

Market Representatives

A. Resident buying office

1. Services provided to store buyers

a. Advice and assistance

(1) Provides information on best sources for goods of desired classification, price, and style
(2) Sometimes obtains price concessions and exclusive styles
(3) Provides help of resident buyer in making selections
(4) Makes office space and personal services available to a store buyer when he is in town
(5) Buys goods for a store whenever the store buyer is unable to go to the market
(6) Supplies information on developments in the wholesale market
(7) Gives advice on special problems of storekeeping

b. Other services

(1) Follows up on store orders to see that goods are shipped on time
(2) Consolidates purchases from several manufacturers into one shipment to save transportation costs
(3) Handles adjustments on returns or cancellations of orders

2. Kinds of resident buying offices

a. Independent

(1) Fee buying office--charges store a service fee
(2) Merchandise broker--collects a commission from manufacturer

b. Store-owned

(1) Syndicated buying office--owned by a chain of stores
(2) Associated buying office--owned jointly by several independent stores

B. Group buying

1. Nature of group buying

a. Semi-fashion or staple merchandise is selected for individual stores by a committee of noncompeting buyers.
b. All stores participating in a group purchase must appeal to the same class of customers; thus, the merchandise selected is salable in all stores.

c. The selection is usually based on a majority vote of the participating buyers. Each buyer agrees to accept at least a stated quantity of the merchandise selected.

2. Advantages of group buying

a. Enables a store to be more competitive regardless of its size
b. Results in better selection because of the combined judgment of the buyers
c. Produces better prices by purchase of larger quantities
d. Saves buying time by assembling merchandise for group inspection
e. Eases exchange of information among the buyers in a group

3. Major limitations of group buying

a. The expense of assembling the group can offset the price advantage.
b. The merchandise may not fit the needs of an individual store.

C. Central buying (within a firm)

1. Chains separate their buying from their selling. Central buyers specialize in selecting merchandise and store managers specialize in selling.

a. There are three main types of central buying:

(1) Central merchandising
(2) Listing system
(3) Central warehousing and requisitioning

Session V

Terms of Purchase: Discounts, Dating, and Shipping Terms

A. Discounts

1. Definition: A discount is a percentage reduction of the price of merchandise granted to the buyer when certain conditions are met.

2. Types of discount

   a. Cash discount--given if payment is made within a stipulated number of days from the date of invoice or from another specified date
   b. Trade discount--given to retailers when sellers quote list price
   c. Quantity discount--given when a large quantity is bought
   d. Seasonal discount--given when an order is placed "off season"

3. Dating

   a. Definition: Dating is specifying the dates of the beginning and end of the discount period and the date when the net amount must be paid.

   b. Types of dating

      (1) Regular dating
      Example: 2/10, net 30--The retailer may deduct two percent if he pays the bill within 10 days of the invoice date. The full amount must be paid within 30 days of the invoice date or the bill becomes delinquent.

      (2) E.O.M. dating
      Example: 2/10 E.O.M., net 30--The retailer may take a two percent discount if he pays the bill by the 10th of the month following the month in which the bill is dated. The full amount must be paid not more than 20 days (30 - 10) after the discount deadline.

      (3) R.O.G. dating
      Example: 2/10, net 30, R.O.G.--The retailer may deduct two percent if he pays the bill within 10 days after receiving the goods. The full amount must be paid by 30 days after receipt of goods.

      (4) Extra dating
      Example: 2/10-90X, net 120--Sometimes buyers ask for and sellers offer extra time to take discounts. If the vendor usually grants terms of 2/10, net 30, he may decide to allow a retailer 90 days extra. In such a case the retailer is given 100 days

(90+10) in which to pay and still receive the two percent discount. He is also given 120 days (90+30) to pay the net amount of the bill.

B. Shipping terms

1. Definition of F.O.B. (free on board)

a. This arrangement answers two questions:

(1) Who is to pay the cost of transportation?
(2) Who is to own the goods and be responsible for them while they are on their way?

2. Types of shipping terms

a. C.O.D. (cash on delivery): The purchaser pays for the merchandise upon receiving it.
b. F.O.B. factory: The purchaser pays all transportation costs and owns the goods from the moment they are shipped out of the factory.
c. F.O.B. shipping point: The seller pays cartage to a place at which the goods are turned over to a transportation company.
d. F.O.B. factory, freight prepaid: The purchaser owns the goods as soon as they are shipped but the seller pays for the transportation.
e. F.O.B. destination: The seller pays all the transportation costs and owns the goods until they arrive at the purchaser's store.
f. F.O.B. destination, charges reversed: The seller owns the goods until they get to the store, but the retailer pays the transportation charges.

C. Buying on memorandum or consignment

1. Memorandum terms: The purchaser buys merchandise with the privilege of returning unsold goods not later than a specified date. Whether or not he takes title to the goods is specified by shipping terms.
2. Consignment terms: The purchaser buys with the privilege of returning any unsold goods but is obligated to follow the instructions of the supplier about selling. The supplier retains title to the goods.

Session VI

Merchandising Personnel: Qualifications and Duties

A. The merchandise division of a department store

1. General merchandise manager

a. Supervises the store's merchandising, makes policy decisions, and plans stocks and promotions

b. Coordinates the work of buyers to avoid duplicate merchandise and to insure uniform policies

c. Reports directly to the general manager (top management)

(1) The general merchandise manager has divisional assistants (middle management) if the store is large enough.
(2) Each division is composed of departments selling related lines of merchandise.

2. Buyer (sometimes called department manager)

a. Duties and responsibilities

(1) Has charge of a merchandise unit (the individual department) which sells either a single kind of merchandise or a group of related items

(2) In many stores is also a department manager, which requires executive ability in addition to buying qualifications

(3) Has the following basic responsibilities:

(a) Buying merchandise that will sell at a profit and bring back satisfied customers
(b) Supervising the sale of merchandise including personal and nonpersonal selling activities
(c) Pricing and repricing merchandise to insure the best profit with no loss of customer acceptance
(d) Supervising unsold stock including checking, protecting and controlling stock
(e) Planning and analyzing department operation for better control

b. Qualifications of an ideal buyer

(1) Business qualifications

(a) Ability to interpret customer demands
(b) Knowledge of merchandise

(c) Knowledge of market and supply resources
(d) Comprehension of merchandise figures and ability to interpret them
(e) Knowledge of sales promotion
(f) Creative ability

(2) Personal qualifications

(a) Leadership ability
(b) Good judgment
(c) Courage
(d) Integrity
(e) Cooperativeness

3. Assistant buyers and heads of stock

a. Directly under the buyer is the assistant buyer; he aids the buyer and is in charge of the department in the buyer's absence.
b. In a large store or department, heads of stock perform some of the duties normally assigned to assistant buyers.

4. Staff bureaus

a. Fashion bureau: Large stores dealing in fashion merchandise have a fashion bureau to aid both buyers and customers.
b. Comparison bureau: This bureau assists buyers by studying the merchandise of competing stores and their rate of sale.

B. The buying function in other kinds of stores

1. In chain stores

a. The buying function is usually in a division by itself.

(1) Because the merchandise handled by all stores of a chain is similar, the use of a buying division is more economical than having a separate buyer for each store.
(2) Example: In a grocery chain one buyer (in the buying division) buys groceries for all stores in the chain, another buyer buys fruit and vegetables for all stores, and still another buys meats for all stores.

2. In very small stores--The proprietor or proprietors usually perform all functions, sometimes with help for routine functions. The proprietor or proprietors thus do all the buying.

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A P P E N D I X

TIPS FOR INSTRUCTORS

A. Preparation

1. The room

   a. Arrange chairs so students can face one another.
   b. Check physical properties, such as heat, light, ventilation, ashtrays, comfortable chairs, freedom from noise, visual aid facilities.

2. Teaching aids--chalkboard, charts, illustrations, diagrams, posters, cartoons, books, manuals, pamphlets, instruction sheets, samples, cutaways, motion pictures, filmstrips or slides, models, exhibits, field trips

3. Teaching methods

   a. Discussion--to warm up or review, to promote understanding, to give reasons, to emphasize factual material, to make people think, to get opinions
   b. Conference--to modify opinions, to develop understanding, to get acceptance
   c. Demonstration, dramatization, and field trips--to show manipulative operations, to clarify principles or theory, to show use of equipment, to orient and explain
   d. Practice and drill--to develop performance skill; to help in retaining information, knowledge, understanding
   e. Lecture--to present information or explain a process

B. Presentation

1. Be positive--direct attention quickly to the subject at hand.

2. Direct the thinking of the group--focus attention on specifics; keep order.

3. Speak correctly--use a pleasant voice, watch pitch and volume; speak slowly and distinctly; enunciate clearly; use proper words.

4. Be well groomed and conservatively dressed.

5. Avoid distracting mannerisms.

6. Start on time; be businesslike; stop on time.

7. You should:

a. Smile--it's standard equipment.
b. Be enthusiastic--it's contagious.
c. Sell--never tell.
d. Change voice, pace, and tone.
e. Provide for participation.
f. Dramatize.
g. Follow your plan.

C. Handling visual aids

1. Flow charts

a. Face the students, not the chart.
b. Be sure everyone can see the flow chart.
c. Use a pointer.
d. First go through the points on the chart quickly.

2. Chalkboard

a. Write legibly, but quickly.
b. Stand beside, not in front of, your writing.
c. Talk while writing.
d. Use as you would a chart presentation when possible (see C, 1, Flow Charts, above).

3. Films (moving picture and slide)

a. Preview the film.

b. Plan introductory remarks.

(1) <u>What</u> the film will show
(2) <u>Why</u> it is being shown
(3) <u>What</u> the students are expected to get out of it

c. Prepare the room and equipment.

d. Prepare students to see the film.

e. Project the film. (Don't leave the room.)

f. Summarize the main points.

D. Using the proper teaching method or methods

1. Discussion, conference, demonstration, practice and drill, lecture (see A, 3, a-e) are all good methods.
2. Do not embarrass an adult by a question he can't answer.

E. Closing the session

1. Summarize the key points.
2. Encourage the students.
3. Promote attendance at next session.
4. Do not assign homework.

POINTERS FOR DISCUSSION LEADERS

A. Prepare the lesson.

1. Determine what is to be presented.
2. Organize your lesson; outline it.
3. Decide the best method of presentation.
4. Plan suitable visual aids: charts, graphs, slides, films, and pamphlets.
5. Reduce your plans to writing:

Title
A.----------
1.--------
2.--------
B.----------
1.--------

B. Prepare yourself.

1. Rehearse your presentation.
2. Time your presentation. It is suggested that you reserve one-half your time for discussion and questions.
3. Attempt to anticipate questions that may be asked.

C. Prepare the room.

1. Check list of materials and aids you plan to use.
2. Check operation of any required equipment.
3. Check room facilities: chalkboard, chalk, erasers, lights.

D. Prepare your class.

1. Introduce yourself.
2. Make a few introductory remarks.

E. Miscellaneous

1. Emphasize and summarize important points.
2. Announce each topic you present; summarize afterwards.
3. When talking face the class, not the chalkboard.
4. Insist students identify themselves when asking questions.
5. Ask that elaborate questions be rephrased into shorter ones.
6. Do not permit questions until end of lecture period.
7. Permit only one question or problem at a time. Carry each problem through to a conclusion before recognizing the next question.

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